In the 18.10.2 4 bugs were repaired in WITS. Below are a summary of the errors and the resolutions of the problems.

Issue	Resolution
GAIN: Clients with newly downloaded GAIN Summaries have previously completed intakes listed as "In Progress"	GAIN: The issue with Intake status when downloading a GAIN-I Summary (GRRS) report is resolved, previously completed Intakes won't be set back to "In Progress" status again after the GRRS report is downloaded and updated in WITS.
Follow-Up: Yellow screen error when user clicks "Save" or "Finish"	ID - Follow-Up: Fixed a yellow screen error that occurred when saving a Follow up record.
Consent/Eligibility Screener: "Disclosed to Agency" is blank	Consent/Eligibility Screener - ID: "Payor Plan Groups" box populates all the available plans based on the Eligibility screener date. Meanwhile, "Disclosed to Agency" dropdown is filled with the appropriate agencies on Consent screen.
Referral: New duplicate client check screen causes problems (ID)	Referral: Resolved issues that occurred while accepting a referral on the duplicate client check screen.

Below you will find a summary of the change to WITS for the 18.10.2 release (which took place 7/25/2016). When these changes are made in Idaho-Mountain and Idaho-Pacific, the top left portion of your screen will say 18.10.2.

Duplicate Client Check

Purpose: When creating a new Client Profile or accepting a Referral, WITS will search your agency for clients with:
- First 3 characters of first name, first 3 characters of last name, and year of birth and will exclude clients with first or last name with less than 3 characters.
  OR
- First character of first name and last 4 numbers of SSN (excluding SSN = 0000)
  OR
- Soundex* of first name, Soundex of last name, and year of birth
  OR

- Soundex of first name and last 4 numbers of SSN (excluding SSN = 0000)

What does this mean when I am accepting a referral?
- You no longer need to link a consent from another agency to an existing client in your agency.
  - Receive a referral in the status of pending. Change the status to placed accepted and click save. A list of similar clients will display.
  - If you select a similar client from the list, the most recently updated Client Profile will be created in your agency.
  - If You click Yes, a new client profile will be created.
  - If you click No, the referral will stay in a status of pending.

What does this mean when I am creating a new client?
- When creating a new client profile and you click save, a list of similar clients will display.
  - If you select a similar client from the list, the most recently updated Client Profile will be created in your agency.
  - If You click Yes, a new client profile will be created.
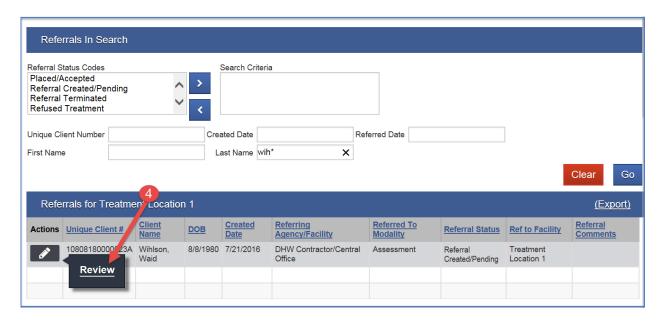 - If you click No, a new client profile will not be created.

Accepting a Referral

1. Getting here: Login, click **Agency**, **Referrals**, **Referrals In** on the Navigation Pane (left menu).

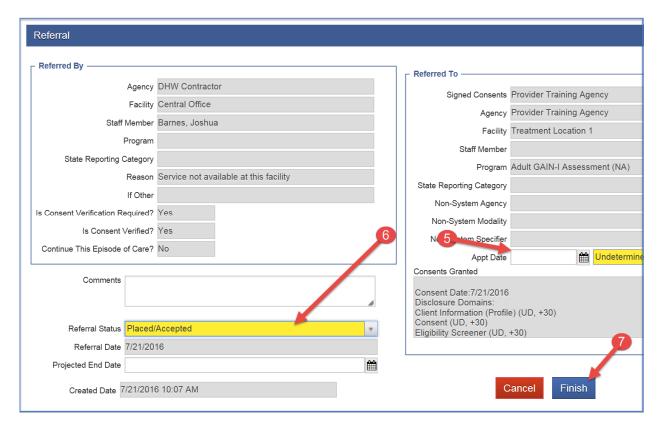2. **Enter the search criteria**.

3. Click Go .

4. Hover over ✏ under Actions and click **Review**.

5. Update the Appointment Date and Status if appropriate.

6. Change the Referral Status to **Placed Accepted**.

7. Click   Finish   .

Similar Clients already exist in the System and are listed below. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or "No" to Cancel the creation of the new record. The Select Action will take you to the record of the duplicate client.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
✏️ Select	10808180000023A	Wilson, Wade	8/8/1980	000-00-0000	Male

Yes   No

8. A list of similar clients displays. **Click Select if one of the clients displayed matches your client**.

What if none of the clients listed is my client?

- **Click   Yes   to continue and create a new Client Profile.**
  OR
- **Click   No   to cancel the creation of the Client Profile.**

9. A Client Profile with information from the selected client will be created in your agency, including:
- Client Name & other demographic information
- Alternate Names (if any)
- Additional Information
- Contact Information, including all addresses
- Allergies (if any)
- Benefit Application (if any).

10. Click **Save**.